CWS/CMS
Quick Reference Guide

County Help Desk Phone #:

Boulder Help Desk Phone #:

CWS/CMS
v5.2

How do I...

Client Services Search

Retrieve information without using the Search menu?

- Use the Binocular icon above the fields in the Contact notebook (Contact page and Associated Services page) and Hearing notebook (Attendees page) that are used to search for a Service Provider, Staff Person, or Attorney.

Retrieve a client when the spelling of a client's name is unknown?

- Use the Phonetic Search feature to find names that have different spelling but similar pronunciation.
- Use wildcard characters.

Use wildcard characters in a search?

- Wildcard searches must always end with the percent (%) character.
- If you are unsure of only one letter, use the underscore (_) character. If you only know part of the name, use the (%) wildcard character to represent a string of letters.
- Some examples: Wh% may return White, Whiley, Wheaton, and so on. W% returns all names that begin with a "W".
- You cannot use the (%) wildcard as a first character when searching for a client's last name, address or street number.
- Wildcard characters are available for the following Search Types:

  Attorney, Client, Education Provider, Service Provider, Substitute Care Provider, Client/Substitute Care Provider, Placement Facility

Retrieve a Placement Facility that is hard to find?

- Use wildcard characters in Substitue Care Provider and other Name fields.
- Use the zip code function to enter up to four possible zip codes.
- Use a search type that is for multiple types of homes.
- Use a region search to search in more than one county.

Help

Use the Help drop-down menu in CWS/CMS?

- From the CWS/CMS Control Panel, or in any CWS/CMS application, select the Contents command in the Help menu.

Use the How Do I... choice?

- Click on the How Do I... choice. The available topics display. Click on a topic to see the subtopics, and select a subtopic to get detailed information as well as links to related topics.

Use the What's New choice in Caseload and Client Services Help?

- Click on the What's New choice. The major changes and additions that occurred with the most recent application release will display. Click on a topic (link) to get detailed information about a new or improved functionality.

Use the Search for Help on... choice?

- Click on the Search for Help on… choice.
- On the Index page, as you type one letter at a time, the dialog box will display index topics starting with the characters you entered. Select an index entry to get detailed information as well as links to related entries.
- On the Find page, type the word you want to find. Select a matching word to narrow your search, and all topics containing that word will display. Select a topic to get detailed information as well as links to related entries.

Find information about a field in any CWS/CMS application?

- Place the cursor in any field and press the F1 function key. Detailed information about the field and links to related topics will display.

How do I...

System Information

Find System Information?

- Click the System Information (i) icon in the CWS/CMS Control Panel to display the following information areas: Computer name, Server, Domain, Last Signon, Password expiration date, Processor, Windows version, and Free Resources.
- In the Help drop-down menu, the About... function also displays information on memory resources and version information of the application.

Spelling

Spell Check in the text boxes?

- Place cursor in text box; select Spell Check from the Edit menu.

Password

Change my Logon Password?

1. Start the CWS/CMS Control Panel.
2. Click the Preferences drop-down menu.
3. Click the Change Password... command.
4. Type your current password in the Old Password field.
5. Type your new password in the New Password and Confirm New Password fields.
6. Click OK.

   Note: The new password must be between 6 and 8 characters and have no more than 3 consecutive characters from the old password. The password must contain a number that is neither the first or last character.

Why Can't I… (Client Services)

General

Request Approval?

- The item for which you are requesting approval must be in focus, e.g., to request approval for a placement, the Placement notebook must be in focus.

Allegation

Fill the Alleged Victim field on the ID page of the Allegation notebook?

- You must have a Client notebook for a child who is 18 years of age or younger.

Enter "Substantiated" in the Allegation Conclusion field of the Allegation notebook?

You must create a Contact notebook with the following:

- "Investigate Referral" entered in the Contact Purpose field.
- "In-Person" entered in the Method field.
- "Completed" entered in the Status field.
- The alleged victim entered in the Participants grid.
- "Staff Person/Child" entered in the Contact Party Type grid.

Add an alleged perpetrator to the Allegation notebook?

- You must create a Client notebook for the alleged perpetrator.

Enter an allegation of abuse by a foster parent?

- You must enter the substitute care provider as a client in the Client Notebook. Complete the Related Clients page indicating the relationship is a foster mother, foster father, or residential facility staff relationship for the child.
- When entering the allegation, select the Perpetrator type of SCP/Residential Facility Staff.

Case

Request Approval for the End Case command?

One of the following circumstances applies:

- A user does not have a Primary or Secondary Assignment or is not the Supervisor of an assigned staff person to the case.
- The Case folder is not in focus.
- An outstanding warrant exists for the Case Focus Child.
- A future hearing date is scheduled.
- A placement and/or placement episode has not been end dated.
- There is a pending case transfer request.
- The case is an Adoption case, and there is no finalization date.

Case Plan

Request Approval for an Initial Case Plan?

You must do all of the following:

- Enter a Primary Ethnicity and Primary Language for the Case Plan Focus Child(ren) (Client notebook, ID page).
- Enter at least one Service Objective for at least one Case Plan Participant (Case Plan notebook, Service Objectives page).
- Enter the Case Plan Goal for each Case Plan Focus Child (Case Plan notebook, CP Participants page).
- Complete all mandatory fields.
- Generate a Case Plan document.

Request Approval for a Case Plan Update?

- Satisfy all conditions listed for the Initial Case Plan and complete the Appropriateness Description field (Case Plan notebook, ID page).

ICWA

Activate the ICWA Eligible field on the ID page of the Client notebook for a child client?

- The child client must be specified as a victim in the Allegation notebook of a Referral or must be a Case Focus Child in a Case.

Generate the *Request for Confirmation of a Child's Status as an Indian* document?

- The SOC 318 page of the Client notebook must be completed.

Client Disposition

Enter "Open New Case" in the Closure Reason field in the Client Disposition dialog box?

- You must enter "Substantiated" in the Conclusion field of the Allegation notebook.
- You must record the child's gender (Client notebook, ID page).

Contact

Get the alleged victim to appear in the On Behalf of Child dialog box when creating a new Contact notebook?

- You must create an Allegation notebook for the alleged victim.

Enter a service on the Associated Services and/or Associated Visits pages in the Contact notebook?

- You must indicate a contact status of "Completed" (Contact notebook, Contact page).

Complete the Provider Name field on the Associated Services page of the Contact notebook?

- You must perform a search for a Service Provider, or if you found no hits in the search results,
- You must create a Service Provider in the Placement Home notebook.

Court

Create a Hearing notebook in a Referral?

- The Referral must contain a child, with at least one allegation, who has not yet been disposed from the Referral.
- If a child is in an open Case, the Hearing notebook must be created in the Case folder.

Remove a child from a scheduled Hearing?

- An associated Court Report or associated Petition for the Hearing exists for that child.

Automatically insert Recommendations into my court document?

- Recommendations can be automatically inserted into Detention, Jurisdictional, or Jurisdictional/Dispositional Hearing court reports only.
- To automatically insert recommendations, create the court report document, select "Recommendations" from the Microsoft Word File menu, and answer the questions in the dialog boxes.

  Note: Only Jurisdictional recommendations will populate into the Jurisdictional/Dispositional Hearing report automatically. Other recommendations will need to be entered manually.

Documents and Reports

Create a Report?

- Some reports require that you complete corresponding fields and notebooks before creating the report, e.g., *Notice of Review Hearing - Juvenile*.

Why Can't I... (Client Services)

History Button

Review Contacts dated more than 30 days ago in a Case or previous Case Plans, Hearings, and Placements?

- You must click the History button in the Open Notebook dialog box. Select one of the three option buttons to specify how far back you want the notebooks to display. Note: All contacts display in a Referral.

Review previous Primary and Secondary Assignments to a Case?

- The Case Assignment grid (Case Information notebook, Assignment page) displays active assignments only. To see previous assignments, click on the History button and specify how far back you want the assignments to display.

Placement

Create a Temporary Custody notebook?

- In order to record temporary custody without a corresponding placement, you must select "Create Temporary Custody Only" in the Placement dialog box.
- When you record temporary custody information without a placement, you must select the Child Released radio button before you will be able to save it to the database (unless you are in LA County).

Create a new Placement notebook?

You must do all of the following:

- Enter a State ID for the child(ren) (Client notebook, ID Num page).
- End date the existing placement(s) for the child(ren).
- Search for the placement home you are attempting to use or, if you found no hits in the search results, create a new Placement Home notebook.

  Note: For an initial foster care or non foster care placement, the system will create a temporary custody page when the placement is created.

End a Placement?

- You must enter a date in the Payment Stop Date field for each ongoing payment request (Placement notebook, Ongoing Request page).
- You must enter a reason for the change in the Placement Change Reason field and an end date in the Placement End Date field (Placement notebook, End Placement/Episode page).

End the Placement episode?

- After ending the Placement, you must enter a date in the Placement Episode End Date field and a reason for termination in the Placement Episode Termination Reason field.

Open Associated Referral or Case

Open a Referral or Case outside my county?

- At least one of the clients in the other county's Referral or Case must also be in a Referral or Case that is actively assigned to you, *or*
- You must have Statewide Read privilege as set up in the Resource Management application.

Why Can't I... (Caseload)

Bulletins

View Bulletins that were sent out since I logged on today?

- Bulletins are sent to the workstation only at the first logon of the day.

View Bulletins more than one week old?

- Bulletins are archived after seven days.
- Bulletins are available in the Bulletins Archive in Caseload Help following the next code drop.

Why Can't I... (Resource Management)

Action Menu

Reassign a Caseload?

- State, County, Office Administrators, and Unit Supervisors have authority to reassign caseloads. A County Administrator can reassign caseloads within any office in their county; an Office Administrator within their office; and a Unit Supervisor within their assignment unit.

Transfer a Staff Person between offices?

- The staff person must have a User ID, can not have an active caseload, can not be a Unit Supervisor, and can not be the main contact for the office.

Staff Person/Office

Record an End Date on the ID page of a Staff Person notebook?

One or more of the following is true:

- The Staff Person is recorded as the Office Contact (CWS Office notebook, ID page). A new Office Contact must be selected.
- The Staff Person is recorded as the Supervisor (Assignment Unit notebook, Staff Authority page). A new Supervisor must be selected.
- The Staff Person has a caseload assigned. All caseloads must be reassigned.

Special Projects

Enter a Special Project in a Referral or Case?

- The Special Project must be recorded in the Resource Management application, County Organization Section (Special Project notebook, ID page).

Privileges

Assign a privilege to a user's Staff Person notebook (some privileges are grayed out)?

- You can give only privileges that you have in your Staff Person notebook.

Make changes to the Placement Facility notebooks?

- You must have Access Authority for Resource Management and Resource Mgmt. Placement Facility Maintenance privileges (Staff Person notebook, Staff Rights page).

Access the Resource Management application?

- You must have Access Authority for the Resource Management privilege (Staff Person notebook, Staff Rights page).

Create a County License Case notebook?

- You must have Access Authority for Resource Management and County License Case Management privileges (Staff Person notebook, Staff Rights page).

Attach

Attach a Substitute Care Provider to a Placement Facility?

- You must have the Placement Home notebook in focus.

Designate a Substitute Care Provider as a Primary Provider?

- A placement facility can only have one substitute care provider with the status of "Primary Provider."